

# EHRI Enterprise Human Resource Integration

# Electronic Official Personnel Folder (eOPF) User Guide

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"Implementation of e-Government is important in making government more responsive and cost effective"

President George W. Bush July 10, 2004



Electronic Official Personnel Folder User Guide

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# Chapter 1: Introduction to eOPF

Electronic Official Personnel Folder (eOPF) is a system developed as a management solution to handle official personnel files and to simplify your access to your own Official Personnel Folder (OPF). The OPF contains human resource (HR) records and documents related to Federal civilian employees. An OPF is created when an employee begins Federal service and is maintained throughout the employee's career in accordance with United States Office of Personnel Management (OPM) regulations.

The eOPF provides electronic, Web-enabled access to OPF for all employees, supervisors, and HR staff members to view eOPF documents. All employees are able to view their own OPF through the eOPF Web interface. The eOPF also allows supervisors to have view-only access to specific documents contained in the eOPF of employees who report directly to them.

eOPF has security measures in place to ensure the integrity of the system. For example, users are able to view their own eOPF documents, but cannot modify the documents. Additionally, all activity performed in the eOPF is logged and can be accessed through various reports.

#### Note:

The eOPF is not a vehicle through which documents can be modified. (Information found on SF-50/52s, benefits documents, etc. can be modified/corrected through agency HR systems, Employee Benefits Information Systems, etc.)

The eOPF has a variety of functions that are accessible depending upon the role of the logged in user. This User Guide covers the basic employee role and assumes you have working knowledge of Microsoft Windows desktop. This Guide covers topics for installed versions of eOPF. If you do not have access to the Internet or the eOPF application, please contact an eOPF administrator to assist you with setup.

#### **IMPORTANT!**

This User Guide includes representative screens from the eOPF; however, your system may be slightly different depending upon your agency's requirements. In addition, some functionality, such as career briefs and position descriptions, is optional and may or may not be configured for your system.

# Chapter 2: Browser and Viewer Requirements

To access and utilize the eOPF, you must use two basic "off-the-shelf" software components: a Web browser application and Adobe Acrobat Reader. The Web browser enables you to view the various system screens such as Logon and Search. Adobe Acrobat Reader enables you to view documents.

#### **Browsers**

You can use commercially available Web browsers to access the eOPF. For best results, it is recommended that you use the latest version of Microsoft Internet Explorer.

#### **Downloading and Configuring the Viewer (Adobe Reader)**

The eOPF stores documents as Portable Document Format (PDF) files, which can be viewed and printed using Adobe Reader. If you do not have Adobe Reader installed on your computer, it is available as a free download on the Internet.

#### Note:

The Adobe Reader "options" should be set to "not" view inside the browser. This option can be accessed by selecting Edit → Preferences → Internet in Adobe Reader v6.x version.

# Chapter 3: Getting Started with eOPF

Before you can perform any activity within the eOPF, you need to log on. Logging on requires that you have a valid user name and password. Your user name and password are created either at system deployment or when you initially become an employee. If you do not already have a user name and password for eOPF, please contact an eOPF administrator to obtain one. If you have a user name, but do not recall your password, a 'Forgot your password?' link is available on the eOPF Web Logon page. When selected, this generates a letter sent by U.S. mail or email, which assigns a new random password to you.

#### Note:

After three (3) consecutive failed attempts to log on to eOPF, you are locked out of the system as a security precaution. The number of failed attempts is configurable by the administrator.

In order to ensure the security of the eOPF, remember to safeguard your user name and password. Some guidelines for password security are:

- Do not share your password with anyone.
- Do not write your password down.
- Do not allow anyone to use eOPF with your user name/password combination, because all eOPF system actions are logged by user name.

After you log on to eOPF, you can change your password. Additional eOPF features that you can use include changing your email address, viewing and updating emergency data, and accessing eOPF online help.

## Logging on to eOPF

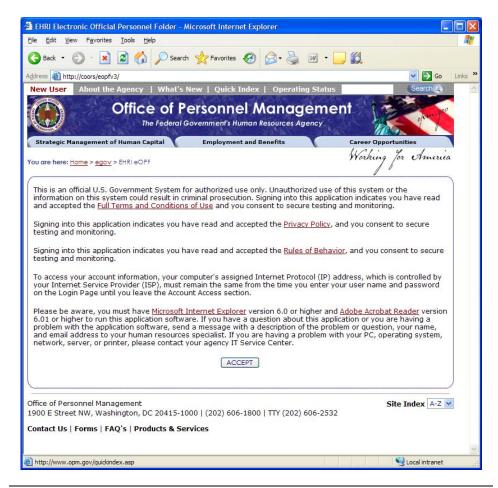
You must log on to the eOPF each time you want to access the system. After you log on to eOPF, you can change your password.

#### To Log on to eOPF:

1. Launch the eOPF application by opening *Internet Explorer* and entering the URL assigned to the eOPF.

The *eOPF User Agreement* page displays.

This figure displays the *eOPF User Agreement* page.



#### Note:

The specific URL address for eOPF will be announced at the time of deployment, or you may obtain the address from the eOPF administrator.

2. Read the *User Agreement* and click the button.

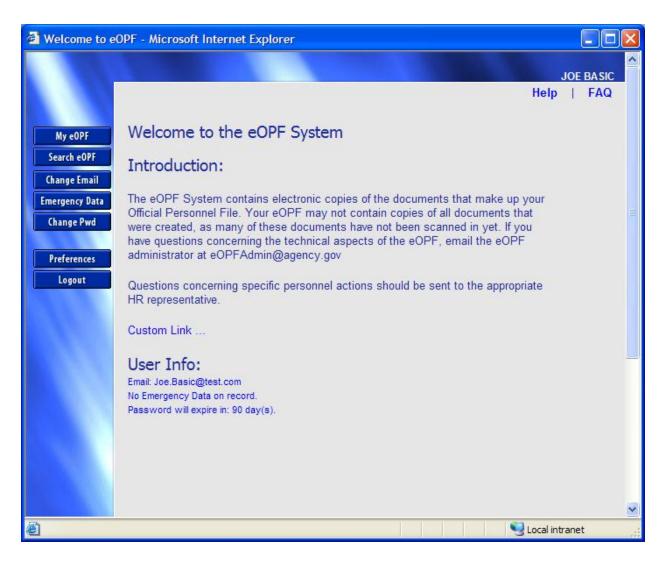
The eOPF Web Logon page displays.

This figure displays the *eOPF Web Logon* page.



- 3. In the eOPF ID field, type your user name.
- 4. Type your password in the Password field.
- **5.** Click the *Submit* button. The *eOPF Welcome* page opens.

The following figure displays the *eOPF Welcome* page.



#### New User - Request a Password

#### To Request a New User Password:

1. From the eOPF Web Login page, click the New User-Request your Password link.

The New User – Password Request page appears.

The following figure displays the *New User – Password Request* page.



- 2. Type your eOPF Logon ID in the eOPF ID field.
  - Type your eOPF email address in the Email Address of record in eOPF field.
  - Type your Home Zip Code in the Home Zip Code of record in eOPF field.
  - Enter problem and contact information in the Message text box. This is limited to 255 characters.
- 3. Click the SUBMIT Submit button.

The **New User** – *Password Request* page reappears displaying the following message "Your password request has been submitted for processing."



Once you request a New User Password, depending on the validation of the information you supplied you will either be emailed a new password directly or the eOPF administrator generates a letter containing your new password. Depending on your organizations policy this letter will be sent by post office or via email.

#### Note:

You can exit the *New User – Password Request* page by clicking the *Cancel* button.

### **Using the Main Menu Buttons**

The eOPF main menu buttons display in the left hand margin of your browser page. The following table describes the eOPF buttons.

Menu Option	Description
My eOPF	Displays all of the contents of your eOPF. You can select individual documents for viewing or printing. See <i>Viewing Your Entire eOPF</i> for details.
Search eOPF	Displays the <i>Search</i> page from which you can filter the contents of your eOPF. You can view or print

Menu Option	Description
	documents using this option. See Searching for Specific Documents in Your eOPF for more details.
Change Email	Displays the <i>Email Address</i> page from which you can enter your email address. See <i>Changing Your Email Address</i> for more details.
Emergency Data	Displays the <i>Emergency Contact Information</i> page from which you can view and update your emergency information. See <i>Viewing and Updating Emergency Data</i> for more details.
Change Pwd	Displays the <i>Change Password</i> page from which you can change your password at any time. See <i>Managing Your eOPF Password</i> for more details.
Preferences	Displays the <i>Preference Web</i> page where user can set general setting such as default forms list shown on search page and the number of rows to return in a result set. The workflow tab is only enabled if you have workflow access.
Logout	Logs you out of the eOPF. See <i>Logging Out of eOPF</i> for more details.

## **Managing Your eOPF Password**

#### **Password Policies**

Passwords are used in conjunction with a user name to gain access to the eOPF. eOPF passwords must adhere to the requirements defined by the eOPF administrator. The following password restrictions can be enabled by the eOPF administrator:

Minimum number of characters

- Contain at least one uppercase letter (i.e., 'A')
- Contain at least one lowercase letter (i.e., 'a')
- Contain at least one number (i.e., '1')
- Contain at least one special character (i.e., !, @, #, \$, %, ^, &, \*, (, ), +, {, }, [, ], ', ;, '', :, ?, >, <, ,, ./)
- Password expiration period

For example, your eOPF password can be set to expire every 90 days. When your password expires, you will be forced to select a new one the next time you log in before proceeding with any other functions.

These password requirements may change since the eOPF administrator can configure the password requirement settings.

## **Manually Changing Your Password**

eOPF provides the ability for you to manually change your password at any time.

### **To Change Your Password:**

1. From the eOPF Welcome page, click the Change Pwd button.

The Change Password page displays.

This figure displays the *Change Password* page.



- 2. Enter your current password in the Old Password field.
- 3. In the New Password field, enter your new password.
- 4. In the *Verify Password* field, enter your new password again.
- 5. Click the UPDATE SUpdate button, which will update your new password in the eOPF.

You can cancel the password change by clicking the button



## **Resetting Your Password**

If you forget your password, eOPF has a facility to allow you to request that your password be reset. This link will bring you to an eOPF password reset request web page. This web page will prompt you for your eOPF ID, eOPF email address of record, eOPF home zip code of record and a free text message in which you can enter additional information including contact information. When you select the "Reset Password" button the entries you made will be compared against data in the eOPF employee information repository. If all three entered values match the stored values then eOPF will send a new password email to you. The email is sent to your email address of record in the eOPF repository. Your email address of record is shown on the eOPF Welcome Page after you log in successfully. Once logged into eOPF you can change this email address if required.

If the values you entered do not match the values held in eOPF repository an email is sent to the eOPF support staff who will contact you to help resolve any login issues.

#### To Request a Password Reset:

1. From the eOPF Web Logon page, click the Forgot your password? link.

The *Reset Password Request* page appears.

The following figure displays the *Reset Password Request* page.



- 2. Type your eOPF Logon ID in the eOPF ID field.
  - Type your eOPF email address in the Email Address of record in eOPF field.
  - Type your Home Zip Code in the Home Zip Code of record in eOPF field.
  - Enter problem and contact information in the Message text box. This is limited to 255 characters.
- 3. Click the SUBMIT Submit button.

The *Reset Password Request* page reappears displaying the following message "Your password request has been submitted for processing. You will either receive an email with your new password or be contacted by support staff." After submitting a password request do not continue to attempt to logon to the application as you will lock out your account.



Once you request a password reset, depending on the validation of the information you supplied you will either be emailed a new password directly or the eOPF administrator generates a letter containing your new password. Depending on your organizations policy this letter will be sent by post office or via email.

#### Note:

You can exit the **Reset Password Request** page by clicking the **Cancel** button.

# Chapter 4: Viewing Documents

eOPF manages personnel documents, which are organized by folder. Folders are created for every employee. Individual documents and forms are filed in chronological order in the individual eOPF folders. Each eOPF folder contains all the documents that are appropriately retained in an OPF in accordance with OPM guidelines in the same manner that the traditional paper-based folders hold the paper personnel documents. The electronic folders that eOPF manages, are organized and stored in accordance with OPM guidelines.

eOPF was designed to give you maximum flexibility in viewing your personnel-related documents. You will be able to view and print these documents using eOPF.

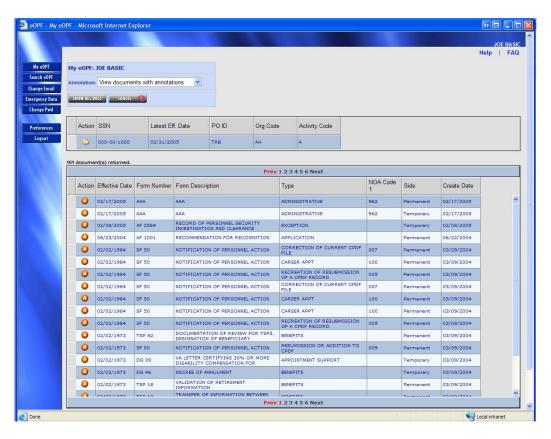
## **Viewing Your eOPF Documents**

Once logged on to the eOPF system, you can click either the *My eOPF* button or *Search eOPF* button to access your OPF information. If you select the *My eOPF* option, you see a listing of all documents stored in your eOPF listed by effective date of the document. If you choose the *Search eOPF* option, you see a filtering page to search for and list specific documents within your eOPF. You can also print one or more documents.

# **Viewing Your eOPF**

To view all contents of your eOPF in order by effective date of the documents, click on My eOPF. After clicking My eOPF, you see the Folder page, which displays a single row representing your eOPF folder. A second listing automatically opens to display your OPF contents.

The following figure displays the *My eOPF Results* page.



From the *My eOPF Results* page, you can access folder actions by clicking on the folder icon :

- Open your eOPF,
- Show All Docs Access Show All Docs page and features,
- Access your emergency contact info,
- View Career Brief Access your career brief (if enabled),
- Clip Folder Access clip folders associated your eOPF, or
- View PDQ Access Position Description (if enabled).

A clip folder is a virtual collection of one or more documents from your eOPF. It is used for quick access by eliminating the need to search through all of the documents within your eOPF. These clips can be public or private. See Working with Paper Clips for more information.



The My eOPF Results page automatically opens your folder and lists its

You can view a document by clicking the 4 Action Button of the corresponding to the document you want to view and selecting the view View option.

#### Note:

Each time an eOPF document is viewed by you or any other individual, the event is logged electronically.

## To View an eOPF Document Using "My eOPF":

Click My eOPF on the eOPF main menu. The *My eOPF Results* page displays.

2. From the *Annotation* drop-down list located at the top of the display, select whether you wish to view the document with or without annotations.

#### Note:

An annotation is a transparent layer placed on top of the document that may be used to highlight, markup, or write comments. These layers can be public or private. The ability to create annotations is only provided to limited groups of people, such as HR specialists.

- 3. Search for and locate the eOPF document you would like to view.
- 4. Click the Action Button of the corresponding to the document you want to view. A pop up menu is activated. Select the View option.

This action opens the document using Acrobat Reader in a new window.

- If the document contains multiple pages, use the Next
   Page and Previous Page buttons located in the document viewer (Adobe Acrobat) to navigate through the document.
- 6. When you are finished, click the **Close** button in the upper right corner of the document viewer window to close the viewer window.

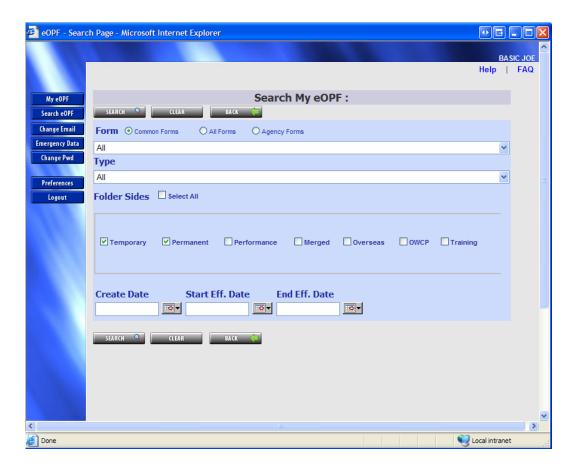
## Searching for Specific Documents in Your eOPF

You can search for and display specific documents in your eOPF. For example, this may be helpful if you are searching for a specific document type or looking for documents created in a specific period of time. To search for specific documents, click the Search eOPF button from the eOPF main menu to display the Search page.

From within the Search page, you can narrow your search by Form, Type, Folder Side, Create Date, and Effective Date range. The Form List is filtered into three categories: Common, All, and Agency. 'Common' option is a predetermine list of forms commonly found in the OPF. 'All Forms' option will provide the entire list of all forms defined in the eOPF repository. 'Agency' option will list only forms that are specific to the agency in which you are an active employee. Your default setting can be set in user preferences.

Important to note that the result set of documents found in your folder and presented to you is also filtered by the Form Setting you have chosen. If you want to see all documents in your folder then chose the "All Forms" choice.

This figure displays the *Search* page.



## To View an eOPF Document Using "Search eOPF":

- 1. Click the Search eOPF button on the eOPF main menu to open the Search page, which allows you to view all or a subset of your eOPF.
- 2. Enter your search criteria to retrieve a list of specific documents in your eOPF.

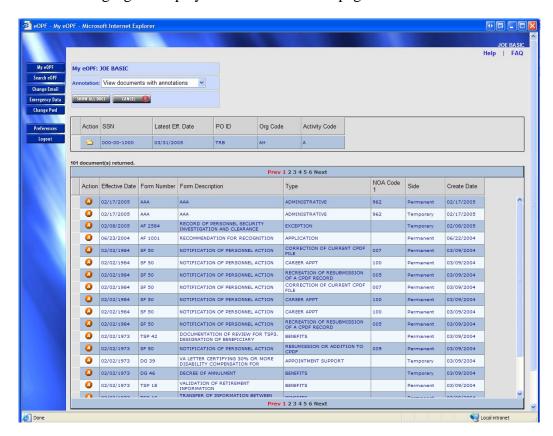
For example, you could search for documents on a specific folder side or you could search by document *Create Date*.

Important to note that the result set of documents found in your folder and presented to you is also filtered by the Form Setting you have chosen. If you want to see all documents in your folder then chose the "All Forms" choice.

# 3. To retrieve all of your documents, click the Search button.

Because of the size of the Search page, we have place the action buttons at both the top and bottom of the page. The *Search Results* page displays when the *Search* button is activated.

The following figure displays the *Search Results* page.



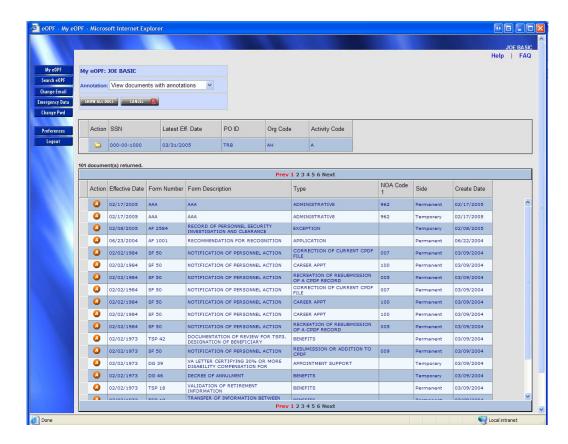
# Click the Show All Docs button to show all documents that meet the search criteria.

The **Show All Documents** page displays.

#### Note:

By using the *Show All Docs* button, you have the ability to select one or more documents, and have them merged into a single document for viewing/printing in the document viewer.

The following figure displays the *Search Results* page.



The following figure displays the *Show All Documents* page.



#### Viewing Documents from the Search Results Page

You can use the *Search Results* page to view and print a document in your eOPF. Note that you can only view and print documents one at a time from the *Search Results* page. If you want to view and print multiple documents at once, see Viewing Documents from the *Show All Documents* Page.

#### To View Documents from the Search Results Page:

From the top of the Search Results page, select whether you want to include annotations or not by choosing an Annotation option.

(See Searching for Specific Documents in Your eOPF for steps on how to display the Search Results page.) The default setting is to include any public annotations on the selected documents.

2. Click the Action Button of the corresponding to the document you want to view and select the view option to view.

The document opens in a new window, using Acrobat Reader.

- 3. If the document contains multiple pages, use the *Next Page* and *Previous Page* buttons located in the document viewer (Adobe Acrobat) to navigate through the document.
- 4. When you are finished, click the **Close** button in the upper right corner of the document viewer window to close the viewer window.

#### Viewing Documents from the Show All Documents Page

You can use the *Show All Documents* page to view and print a document in your eOPF. You can view and print multiple documents at once from the *Show All Documents* page.

#### To View Documents from the Show All Documents Page:

 From the Show All Documents page, click the checkbox(es) corresponding to the document(s) you want to view.

(See Searching for Specific Documents in Your eOPF for steps on how to display the Show All Documents page.)

# Use the CHECK All and UNCHECK All Uncheck All buttons to select and deselect all documents listed.

2. Check the *Print* column on the *Show All Documents* page. If the document is single-sided, click the *Print Single Sided* button.

The document opens using Acrobat Reader in a new window. If you selected more than one document, the documents are merged to create a new document.

-OR-

# If the document is double-sided, click the *Print Doubled Sided* button.

The document opens using Acrobat Reader in a new window. If you selected more than one document, the documents are merged to create a new document.

#### Note:

You must have access to a duplex printer for double-sided printing.

- 3. If the document contains multiple pages, use the *Next Page* and *Previous Page* buttons located in the document viewer to navigate through the document.
- 4. When you finish, click the Close button in the upper right corner of the document viewer to close the viewer window.

#### Note:

Using the **Show All Docs** button to view and print document(s) will always include annotations.

#### Show All Documents for a Specific Folder using Search eOPF

Showing all documents for a certain folder allows easy bulk printing of documents and a way to add many documents to a clip folder at once.

1. Click the Search eOPF button from the main menu on the eOPF application to open the Search page.

This page allows an Investigator to query by PO ID, SSN, Last Name, Activity Code, Organization Code, Employee ID, NOA Code 1, NOA Code 2, and Query Package and to filter within the results by Form, Type, Folder Side, Create Date, and Effective Date range.

# 2. Enter search criteria and click the button.

The Search Results page displays.

This figure displays the *Search Results* page.



3. Click on the Folder Action icon and select the Show All Docs option to display the documents contained in the chosen folder.

The *Show All Documents* page will appear and display all documents for this folder. The following figure shows the *Show All Documents* page.



## Changing the Viewing Size of an eOPF Document

Once you open a document, you may need to change the way it appears on your screen. Perhaps you need to change the size to fit in your monitor or you would like to zoom in to view details. The following steps demonstrate how to use the Adobe Acrobat document viewer.

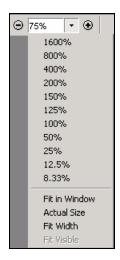
## To Change the Page Size:

1. Search for and open the desired eOPF document. If there are multiple pages, navigate to the page you wish to view by using the *Next Page* and *Previous Page* buttons.

# 2. Click the Zoom In or Zoom Out buttons to change page sizes.

You can also select a view size from the drop-down list. The numbers represent the percent of original size.

The following figure displays the **Zoom** drop-down list.



# 3. To return to screen size, select *Fit in Window* from the drop-down list.

### **Viewing Annotations within an eOPF Document**

The eOPF includes an annotation feature to allow HR specialists to make annotations on documents. Annotations are preserved as transparent layers that sit on top of the original document. As a basic user, you only have access to view public annotations on your folder.

The annotation is attached directly to the page the comment references. You can view or print the document in its original state or with the annotations that have been added. Furthermore, if multiple HR users make annotations, each is saved as a separate layer, which preserves the information about who added what information.

Annotations are added separately to each individual page of a document. Therefore annotating multi-paged documents requires navigation to each page to view the annotations for that page.

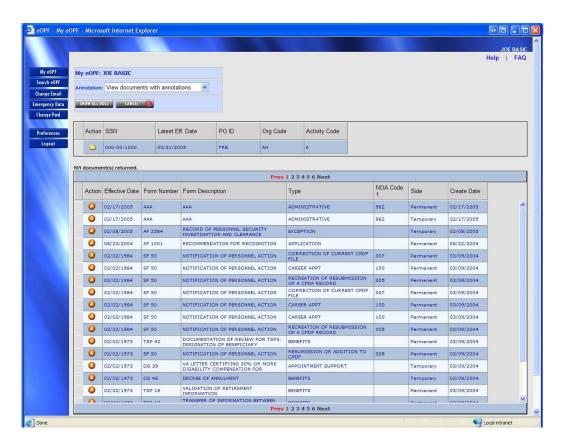
There are two classifications of an annotation: **public** and **private**. Unless you define an annotation as "private," it can be viewed by anyone who views the document via the eOPF. In addition, a public annotation may be edited or deleted by any HR specialist or supervisor who has the ability to create an annotation. Private annotations can only be viewed and or edited by the user who created the annotation. eOPF administrators can view and modify both types of annotations.

#### To View an eOPF Document:

1. After clicking *My eOPF*, search for and locate the eOPF document you would like to view.

The Search Results page displays.

The following figure displays the *Search Results* page.



2. From the *Annotations* drop-down list located at the top of the display, select *View documents with annotations*.

This is the default setting.

- 3. You can view a document by clicking the Action Button of the corresponding to the document you want to view and selecting the View option.
  - The document opens using Acrobat Reader in a new window.
- 4. If the document contains multiple pages, use the *Next Page* and *Previous Page* buttons located in the document viewer to navigate through the document.
- 5. When you are finished, click the **Close** button in the upper right corner of the document viewer window to close the viewer window.

#### **Viewing Instruction Pages**

The eOPF allows you to see instruction pages related to forms placed in your eOPF. When an eOPF administrator adds a form to the system, the eOPF administrator can also add instruction pages. If a form includes instruction pages, the icon is enabled on the Action Menu.

## **To View Document Instruction Pages:**

1. After clicking *My* e*OPF*, search for and locate the e*OPF* document in your folder with instructions you would like to view.

eOPF - My eOPF - Microsoft Internet Explorer My eOPF: JOE BASIC Annotation: View documents with annotations Action SSN Latest Eff. Date PO ID Ora Code Activity Code © 000-00-1000 03/31/2005 Prev 1 2 3 4 5 6 Next NOA Code Side Action Effective Date Form Number Form Description O2/17/2005 AAA AAA ADMINISTRATIVE 962 Permanent 02/17/2005 (A) 02/17/2005 AAA AAA ADMINISTRATIVE 962 Temporary 02/17/2005 02/08/2005 AF 2584 RECORD OF PERSONNEL SECURITY EXCEPTION 06/23/2004 AF 1001 RECOMMENDATION FOR RECOGNITION APPLICATION

02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION CORRECTION OF CURRENT CPDF FILE Permanent 06/22/2004 02/02/1984 SF 50 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION.
 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION.
 RECREATION OF RESUBMISSION OF A CPOR RECORD.
 CORRECTION OF CURRENT CPDF.
 CORRECTION OF CURRENT CPDF. NOTIFICATION OF PERSONNEL ACTION CAREER APPT Permanent 03/09/2004 Permanent 03/09/2004 Permanent 03/09/2004 02/02/1973 TSP 42 DOCUMENTATION OF REVIEW FOR TSP2,
 DESIGNATION OF BENEFICIARY
 02/02/1973 SF 50 NOTIFICATION OF PERSONNEL ACTION
 CDDF
 C Permanent 03/09/2004 02/02/1973 DG 39 VA LETTER CERTIFYING 30% OR MORE DISABILITY COMPENSATION FOR APPOINTMENT SUPPORT Temporary 03/09/2004 O2/02/1973 DG 46 DECKEE OF ANNUMENT BENEFITS
O2/02/1973 TSP 18 VALIDATION OF RETIREMENT BENEFITS
NFORMATION
TAMBER OF INFORMATION BETWEEN Prev 1 2 3 4 5 6 Next

The following figure displays the eOPF *Search Results* page.

You can view a document by clicking the 4 Action Button of the corresponding to the document you want to view and selecting the [3] Instruction Page option.

The instruction pages open in a new window.

- 3. If the document contains multiple pages, use the Next Page and Previous Page buttons located in the document viewer to navigate through the document.
- When you are finished, click the Z Close button in the upper right corner of the document viewer window to close the viewer window.

# Chapter 5: Printing

Although the eOPF is designed to make reviewing your OPF more of a paperless process, there will be times when you will need a hard copy of an OPF document. You can print documents with or without annotations.

You can choose to print all or specific documents found in your eOPF. Using the *My eOPF* option, you can only print a single document at a time. Using the *Search eOPF* option, you can select one or more documents from your eOPF for printing.

# Printing an eOPF Document Using My eOPF

#### To Print an eOPF Document:

- 1. After clicking My eOPF and expanding your folder, search for and locate the desired eOPF document to print.
- 2. You can view a document by clicking the Action Button of the corresponding to the document you want to view and selecting the View option.

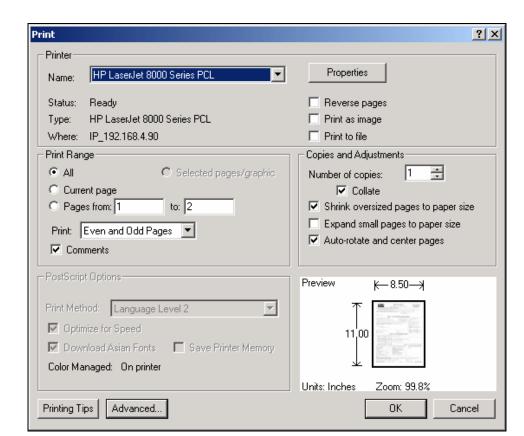
Do not forget to set your desired annotation setting. The default setting for printing annotations is *Print All Annotations*.

#### Note:

The column labeled *Print* on the *Search Results* and *Show All Documents* pages indicates whether the original document was a single or a double-sided document. The Print column may not be visible if disabled in your preferences. See *Changing Your Preferences*.

3. On the document view window toolbar, click either the Print button, or select File, Print from the viewer window menu.

The *Print Dialog* box opens. Ensure that your printer settings are correct.



The following figure displays the *Print Dialog* window.

#### Note:

If you are printing a double-sided document, make sure that the printer selected is capable of performing duplex printing.

- 4. When you finish modifying the printer settings, click the OK button in the printer setup dialog box.
  - The document begins to print.
- 5. Click the Cancel button to exit the print mode.
- 6. Click the **I** Close button to close the document view window.

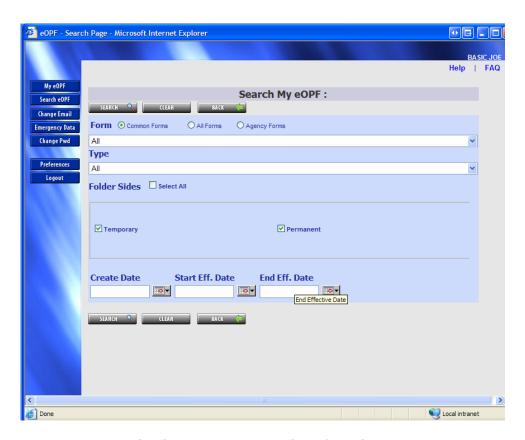
# Printing Entire eOPF or a Subset of Documents Using Search eOPF

eOPF produces search results pages that contain the list of documents matching your search query. You have the option of printing one or more documents directly from the results page, if desired.

#### To Print One or More Documents Based on Search Results:

1. Click the Search eOPF button on the eOPF main menu. The Search page displays.

This figure displays the *Search* page.



Enter search criteria to narrow the list of desired documents and click the SEARCH Search button.

-OR-

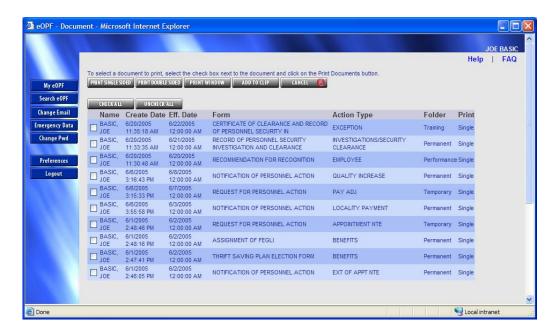
Click on the SEARCH Search button without entering search criteria if you desire all documents within your eOPF.

The **Search Results** page displays.

3. From the Search Results page, click the All Docs button.

The *Show All Documents* page appears containing only the documents that meet the search criteria.

This figure displays the *Show All Documents* page.



- 4. Select the documents to print by clicking on the checkbox(es) to the left of each document. You can select all listed documents by clicking on the CHECKALL Check All button.
- 5. Click either the PRINT SINGLE SIDED Print Single Sided or the PRINT DOUBLE SIDED Print Double Side button located at the top of the page to start the printing process.

  The selected degree are marked into a single RDF degree and and a single RDF degree an

The selected documents are merged into a single PDF document and displayed in the document viewer.

## Note:

Use the PRINT WINDOW Print Window button on the Show All Documents page to print the shown list.

- 6. From the document viewer click the *Print* option.
- 7. Click the Close button in the top right corner of the document view window to close the document.

# Chapter 6: Working with Paper Clips

#### **Paper Clipping Documents within Your Folder**

eOPF provides the ability to "paper clip" documents from the same folder together. These paper clips are actually associations that allow you to view groupings of documents. eOPF paper clipping allows you to select individual pages within a document for clipping or to select multiple complete documents to be inserted into a paper clip folder.

Each folder can have an unlimited number of paper clips. For maximum usability, we recommend that you paper clip documents by meaningful association, such as "all benefit forms associated with the birth of an employee's child".

eOPF allows you to create two kinds of paper clips – public and private. Any user of the eOPF can see public clips. Private clips can only be seen by the creator, administrator, or HR Specialist that manage the OPFs. "Private" paper clips can be reassigned as "public" paper clips by either the clip owner or the eOPF administrator.

If a document that has been "paper clipped" to other documents is deleted from the eOPF, the paper clip remains intact (with the other clipped documents), minus the newly deleted and purged document.

## Creating a Paper Clip

The first step in using paper clips is to create a new paper clip for a folder.

#### To Create a New Paper Clip for a Folder:

1. Click the *My eOPF* button on the eOPF main menu. The *Folder* page displays a single row representing your eOPF folder. eOPF - My eOPF - Microsoft Internet Explorer Annotation: View documents with annotations Action SSN Latest Eff. Date PO ID Org Code Activity Code 000-00-1000 Prev 1 2 3 4 5 6 Next NOA Code Side Action Effective Date Form Number Form Description O2/17/2005 AAA Permanent 02/17/2005 (A) 02/17/2005 AAA AAA ADMINISTRATIVE Temporary 02/17/2005 Permanent 06/22/2004 02/02/1984 SF 50 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION CAREER APPT Permanent 03/09/2004 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION CORRECTION OF FILE

NOTIFICATION OF PERSONNEL ACTION CAREER APPT 02/02/1984 SF 50 Permanent 03/09/2004 02/02/1984 SF 50 ② 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION CAREER APPT Permanent 03/09/2004 DOCUMENTATION OF REVIEW FOR TSP3, DESIGNATION OF BENEFICIARY BENEFITS 02/02/1973 TSP 42 Permanent 03/09/2004 NOTIFICATION OF PERSONNEL ACTION RESUMISSION OR ADDITION TO CPDF O2/02/1973 SF 50 02/02/1973 DG 39 VA LETTER CERTIFYING 30% OR MORE DISABILITY COMPENSATION FOR APPOINTMENT SUPPORT Temporary 03/09/2004 O2/02/1973 DG 46 DECREE OF ANNULMENT VALIDATION OF RETIREMENT INFORMATION TRANSFER OF INFORMATION BETWEEN 02/02/1973 TSP 18

The following figure displays the My eOPF Results page.

2. Click on the Folder Action icon and select the Clip Folder Option to open the Clip Folders page of this folder.

Prev 1 2 3 4 5 6 Next

.

The following figure displays the *Clip Folders* page.



3. Enter a description for the paper clip in the *Description* field.

For maximum usability, try to be as specific and descriptive as possible.

4. In the Security field, select either Public or Private based on your needs.

eOPF allows you to create two kinds of paper clips – public and private. Any user of the eOPF can see public clips. Private clips can only be seen by the creator, administrator, or HR Specialist that manage the eOPFs.

- 5. Click the Insert button.
- 6. Click the Back button to return to the previous page.

#### Adding Documents to a Paper Clip

Once you add a paper clip to your folder, you can add additional documents to the paper clip at any time. This can be done from either the *My eOFF Results* page or from the *Show All Documents* page.

# To Add Documents to a Paper Clip from *My eOPF Results* page:

1. Click the *My eOPF* button on the eOPF main menu. The *My eOPF Results* page displays your eOPF folder and document contents.

eOPF - My eOPF - Microsoft Internet Explorer Annotation: View documents with annotations Action SSN Latest Eff. Date PO ID Org Code Activity Code 000-00-1000 03/31/2005 Prev 1 2 3 4 5 6 Next NOA Code Side Action Effective Date Form Number Form Description O2/17/2005 AAA Permanent 02/17/2005 (A) 02/17/2005 AAA AAA ADMINISTRATIVE Temporary 02/17/2005 □ 06/23/2004 AF 1001 RECOMMENDATION FOR RECOGNITION APPLICATION Permanent 06/22/2004 02/02/1984 SF 50 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION CAREER APPT Permanent 03/09/2004 02/02/1984 SF 50 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION CORRECT FILE Permanent 03/09/2004 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION CAREER APPT 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION CAREER APPT Permanent 03/09/2004 BENEFITS 02/02/1973 TSP 42 Permanent 03/09/2004 NOTIFICATION OF PERSONNEL ACTION RESUMISSION OR ADDITION TO CPDF 02/02/1973 SF 50 02/02/1973 DG 39 VA LETTER CERTIFYING 30% OR MORE DISABILITY COMPENSATION FOR APPOINTMENT SUPPORT O2/02/1973 DG 46 DECREE OF ANNULMENT VALIDATION OF RETIREMENT INFORMATION TRANSFER OF INFORMATION BETWEEN 02/02/1973 TSP 18 Permanent 03/09/2004 Prev 1 2 3 4 5 6 Next

The following figure displays the My eOPF Results page.

2. On the My eOPF Results page, click the Action Button of the corresponding to the document you want to view and select the Add to Clip Add Clip icon, for the document you want to place in a clip folder.

This opens the *Add Clip to Clip Folder* page.

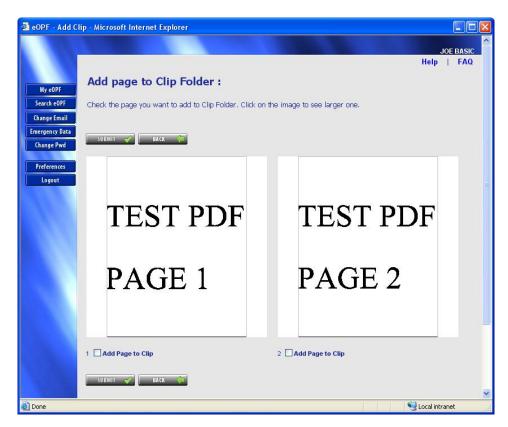
The following figure displays the *Add Clip to Clip Folder* page.



4. Click the Select button to add the clip to the clip folder.

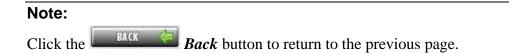
The Add Page to Clip Folder page appears.

The following figure displays the *Add Page to Clip Folder* page.

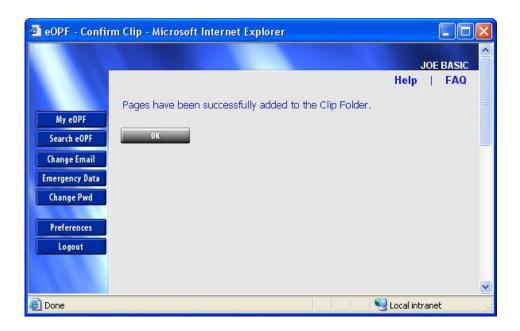


5. Select the Additional Pages you want to add to the clip, and then click the SUBMIT Submit button.

The Confirmation page appears.



The following figure displays the *Confirmation message* page.



6. Select the OK button. The Search Results page reappears.

# To Add Documents to a Paper Clip from Show All Docs page:

1. Click the *My eOPF* button on the eOPF main menu. The *My eOPF Results* page displays your eOPF folder.

eOPF - My eOPF - Microsoft Internet Explorer Annotation: View documents with annotations Action SSN Latest Eff. Date PO ID Org Code Activity Code 000-00-1000 Prev 1 2 3 4 5 6 Next NOA Code Side Action Effective Date Form Number Form Description 962 Permanent 02/17/2005 (A) 02/17/2005 AAA AAA ADMINISTRATIVE Temporary 02/17/2005 05/23/2004 AF 1001 RECOMMENDATION FOR RECOGNITION APPLICATION
CORRECTION OF CURRENT CPDF FILE Permanent 06/22/2004 ② 02/02/1984 SF 50 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION
 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION
 07 A CODE RECORD
 CORRECTION OF CURRENT CPDF
 CORRECTION OF CURRENT CPDF Permanent 03/09/2004 Permanent 03/09/2004 Permanent 03/09/2004 DOCUMENTATION OF REVIEW FOR TSP3,
DESIGNATION OF BENEFICIARY

NOTIFICATION OF PERSONNEL ACTION

RESUMISSION OR ADDITION TO
CPOF ✓ 02/02/1973 TSP 42
 ✓ 02/02/1973 SF 50 Permanent 03/09/2004 △ 02/02/1973 DG 39 VA LETTER CERTIFYING 30% OR MORE DISABILITY COMPENSATION FOR APPOINTMENT SUPPORT Temporary 03/09/2004 02/02/1973 DG 46 DECREE OF ANNULMENT VALIDATION OF RETIREMENT INFORMATION TRANSFER OF INFORMATION BETWEEN 02/02/1973 TSP 18 BENEFITS

Prev 1 2 3 4 5 6 Next

SHOW ALL DOCS

The following figure displays the My eOPF Results page.

# 2. From the *My eOPF Results* page, click the *Show All Docs* button.

The *Show All Documents* page appears containing only the documents that meet the search criteria.

The following figure displays the *Show All Docs* page.



3. Using the Show All Docs page, select the documents you want to add to a clip folder. Click the ADD TO CLIP Add to Clip button, which opens the Add Clip to Clip Folder page.

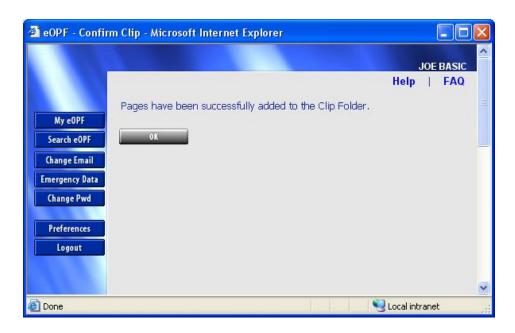
The following figure displays the *Add Clip to Clip Folder* page.



4. Click the Select button to add the documents to the clip folder.

The entire set of selected documents is added to the selected clip folder.

The following figure displays the *Confirmation message* page.



5. Select the OK button.

The Search Results page reappears.

# Viewing Documents within a Paper Clip

Once a paper clip has been created and populated, you can view a list of the documents associated with that clip and view those documents.

# To View Documents Contained within a Paper Clip:

1. Click the *My* e*OPF* button on the e*OPF* main menu. The *Search Results* page displays your e*OPF* folder.

eOPF - My eOPF - Microsoft Internet Explorer Annotation: View documents with annotations Action SSN Latest Eff. Date PO ID Org Code Activity Code 000-00-1000 03/31/2005 Prev 1 2 3 4 5 6 Next NOA Code Side Action Effective Date Form Number Form Description O2/17/2005 AAA Permanent 02/17/2005 (A) 02/17/2005 AAA AAA ADMINISTRATIVE Temporary 02/17/2005 Permanent 06/22/2004 02/02/1984 SF 50 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION CAREER APPT Permanent 03/09/2004 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION CAREER APPT

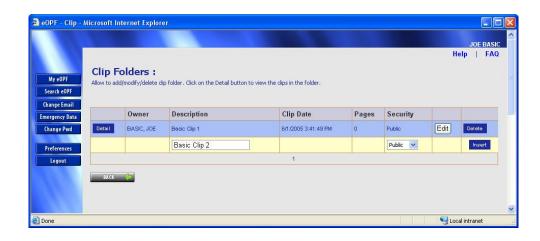
NOTIFICATION OF PERSONNEL ACTION CAREER APPT 02/02/1984 SF 50 Permanent 03/09/2004 02/02/1984 SF 50 ② 02/02/1984 SF 50 NOTIFICATION OF PERSONNEL ACTION CAREER APPT Permanent 03/09/2004 DOCUMENTATION OF REVIEW FOR TSP3, DESIGNATION OF BENEFICIARY BENEFITS Permanent 03/09/2004 NOTIFICATION OF PERSONNEL ACTION RESUMISSION OR ADDITION TO CPDF O2/02/1973 SF 50 02/02/1973 DG 39 VA LETTER CERTIFYING 30% OR MORE DISABILITY COMPENSATION FOR APPOINTMENT SUPPORT Temporary 03/09/2004 O2/02/1973 DG 46 DECREE OF ANNULMENT VALIDATION OF RETIREMENT INFORMATION TRANSFER OF INFORMATION BETWEEN 02/02/1973 TSP 18 Permanent 03/09/2004

The following figure displays the My eOPF Results page.

2. Click on the Folder Action icon and select the Clip Folder Clip Folder option to open the Clip Folders page for this folder.

BENEFITS Prev 1 2 3 4 5 6 Next

This figure displays the *Clip Folders* page.



# 3. Click the Detail button next to the desired paper clip.

The View Clip Folder page appears.

This figure displays the *View Clip Folder* page.



4. Click the View Doc icon to view the desired document within the clip.

The document appears.

#### Note:

A paper clip is classified as *public* or *private*. A public paper clip can be viewed by any user accessing the selected folder. However, a private caper clip can be viewed <u>ONLY</u> by the user who created the paper clip, an eOPF administrator, and any HR Specialist that manages the OPF.

5. Click the Back button to return to the previous page.

#### Removing a Document from a Paper Clip

As your use for paper clips changes over time, you may need to modify the contents of a paper clip. In addition to being able to add documents to a paper clip at any time, you also have the option of removing them from the paper clip.

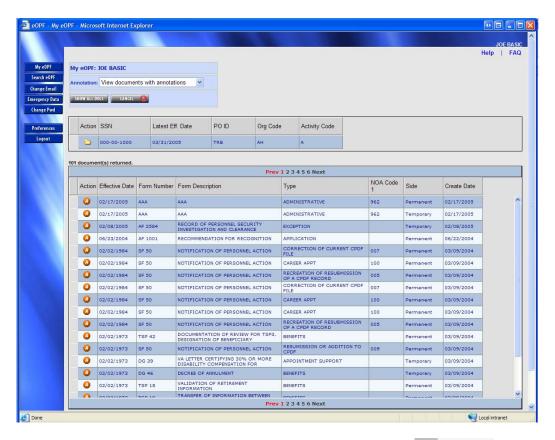
#### Note:

Removing a paper clip from a document <u>does not</u> remove the document from the system. Rather, it removes the association of the document to the other paper clipped documents.

## To Remove a Document from a Paper Clip:

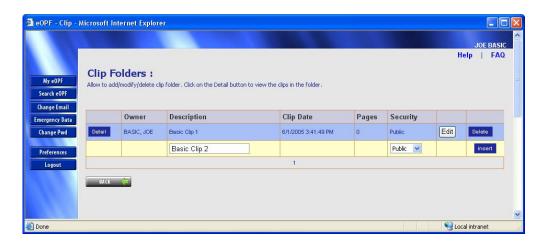
1. Click the *My* e*OPF* button on the e*OPF* main menu. The *Search Results* page displays your e*OPF* folder.

The following figure displays the My eOPF Results page.



2. Click on the Folder Action icon and select the Clip Folder Option to open the Clip Folders page for this folder.

The following figure displays the *Clip Folders* page.



3. Click the Detail Detail button next to the desired Paper Clip.

The View Clip Folder page appears.

The following figure displays the *View Clip Folder* page.



4. Click the Delete icon to delete the desired document within the clip.

The document is removed from the clip.

#### Note:

A paper clip is classified as *public* or *private*. A public paper clip can be viewed by any user accessing the selected folder. However, a private paper clip can be viewed <u>ONLY</u> by the user who created the paper clip, a member of the eOPF Administrator user group, or any HR Specialist that manages the OPF.

# Note: Click the Back button to return to the previous page.

# Designating a Public Paper Clip as Private and Vice Versa

When a paper clip is assigned the status of "private," only the creator, the eOPF administrator, and HR Specialists managing the OPF will have access to it.

## To Designate a Public Paper Clip as Private (and Vice Versa):

1. Click the *My eOPF* button on the eOPF main menu.

The *Folder* page displays a single row representing your eOPF folder.



The following figure displays the My eOPF Results page.

2. Click on the Folder Action icon and select the Clip Folder Clip Folder option to open the Clip Folders page of this folder.

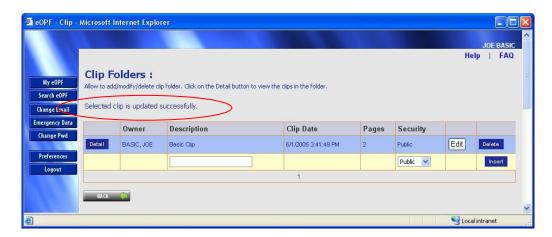
The following figure displays the *Clip Folders* page.



- 3. Click the Edit button associated with the document.
- 4. In the Security field, select either Public or Private based on your needs.
- 5. Edit the desired fields, and then click the Update button.

The *Clip Folders* page reappears displaying the following message: "Selected clip is updated successfully" above the list as shown in the following figure.

This figure displays the *Clip Folders* page with the verification message.



#### Note:

A paper clip is classified as *public* or *private*. A public paper clip can be viewed by any user accessing the selected folder. However, a private paper clip can be viewed <u>ONLY</u> by the user who created the paper clip and the eOPF administrator.

6. Click the Cancel button to return to abort the edit process.

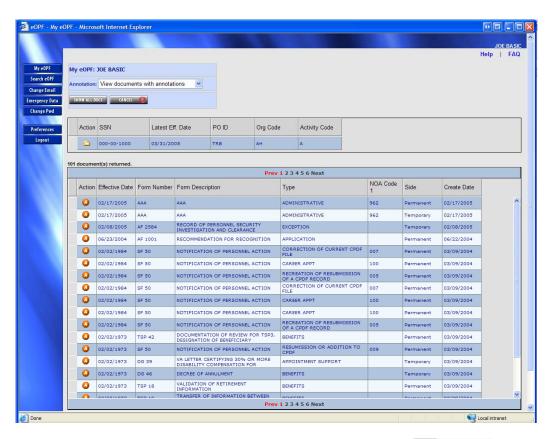
#### **Deleting a Paper Clip**

eOPF provides you the ability to delete paper clip associations you have created. Deleting a paper clip only removes the association between the documents, not the documents themselves. If you wish to remove a document from eOPF, please see an eOPF administrator.

# To Delete a Paper Clip Association from a Set of Documents:

1. Click the *My eOPF* button on the eOPF main menu. The *Search Results* page displays your eOPF folder.

The following figure displays the My eOPF Results page.



2. Click on the Folder Action icon and select the Clip Folder Option to open the Clip Folders page of this folder.

The following figure displays the *Clip Folders* page.



# 3. Click the Delete button.

The *Confirmation* pop-up box appears.

The following figure displays the *Confirmation* pop-up box.



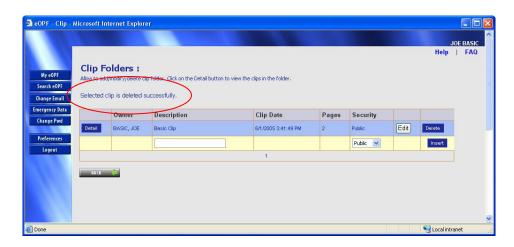
## Note:

To cancel the deletion of the record, click the *Cancel* button.

# 4. Click the OK button.

The *Clip Folders* page reappears displaying the following message "Selected clip is deleted successfully".

The following figure displays the *Clip Folders* page with a confirmation message.



## Note:

Click the *Back* button to return to the previous page.

# Chapter 7: Using Other Functions

The eOPF application allows you to change your email address, view and update emergency data, access eOPF online help, change your user preferences and view your career brief.

# **Changing Your Email Address**

The eOPF application notifies users when new eOPF documents are added via email, therefore if your email address changes it is important that you update it in the system. eOPF allows all users to change their email address.

# To Change Your Email Address:

1. Click the *Change Email* button on the eOPF main menu. The *Email Address* page appears.

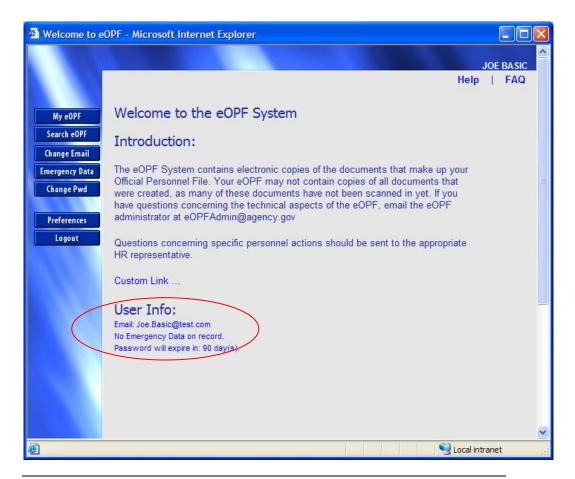
The following figure displays the *Email Address* page.



- 2. Type your email address in the Your Email Address field.
- 3. Click the *Update* button.

  The *eOPF Welcome* page appears with the updated email address displayed.

The following figure displays the *eOPF Welcome* page with an updated email address.



#### Note:

CANCEL You can exit the *Change Email* page by clicking the Cancel button and return to the eOPF Welcome page.

# **Viewing and Updating Emergency Data**

The eOPF application allows you to enter emergency contact information. This information is available to your supervisor and/or HR personnel for emergency use only.

## To View and Update Emergency Data:

1. Click the Emergency Data button on the eOPF main menu. The *Emergency Contact Information* page appears.

The following figure displays the *Emergency Contact Information* page.



2. Edit the desired fields, then click the button.

The *Emergency Contact Information* page reappears displaying the message "Emergency data updated successfully."

#### Note:

You can exit the *Emergency Contact Information* page by clicking the *Cancel* button and return to the *eOPF Welcome* page.

# **Changing Your Preferences**

The eOPF application allows users to set specific preferences when using the application. There are two types of preferences: General and Workflow. Workflow is only accessible if you have workflow enabled for your account. If you do not have a workflow enabled account a message is displayed indicating you do not have access when you try to access the workflow preference tab.

The following figure displays the Workflow Preferences page with denial of access message.

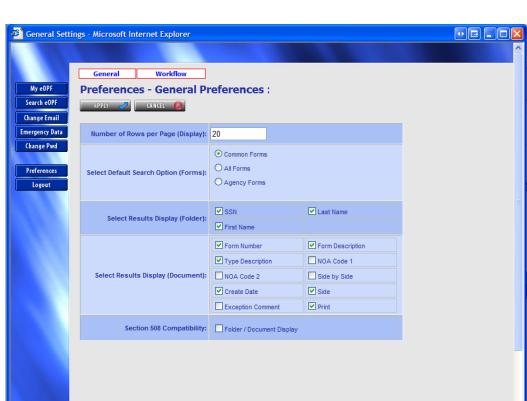


From the General Preferences tab, a user can set the default forms list that are provided on the Search Page and the number of rows to display in a result set. The number of rows is relevant to HR Specialist and Administrators to control long lists within the administration pages of eOPF. The filter on the Forms list improves performance by reducing the size of the list transmitted to your web browser. If you select 'All Forms' your list will probably exceed three hundred forms.

#### To Change Your Preferences (General):

**Preferences** Click the Preferences button on the eOPF 1. main menu.

The *Preferences* page appears with the General tab active.



The following figure displays the *General Preferences* page.

- 2. Type your desired number of rows per page in the *Number* of Rows per Page (Display) field.
- 3. Select the Default Search Option (Forms) you desire. .

The choices are: Common Forms, All Forms, and Agency Forms. Common forms are defined by the agency as forms people typically search to see. All Forms produce a very large list of all possible forms including a mix of agency specific and federal forms. Agency Forms produces a list of forms that are owned by the particular agency you are a member of.

4. Select which fields you'd like to see in the results display (folder level)

The choices are: The options are SSN, First Name, and Last Name

5. Select which fields you'd like to see in the results display (document level)

The choices are: The options are Form Number, Form Description, Type Description, NOA Code 1, NOA Code 2, Side by Side, Create Date, Side, Exception Comment, and Print.

# 6. Check if you'd like to have folder/document display compatible with Section 508 standards.

When enabled, instead of drop-down actions for folders/documents, they will be displayed in cells that can be accessed by using the keyboard. Uncheck to re-enable the drop-down actions.

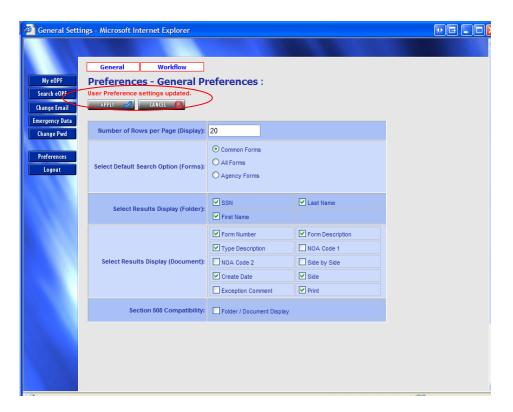
#### Apply button. 7. Click the

The *Preference* page displays a message "User Preference settings updated."

#### Note:

To cancel and return to *eOPF Welcome* page, click the *Cancel* button.

The following figure displays the General Preferences page with a confirmation message.

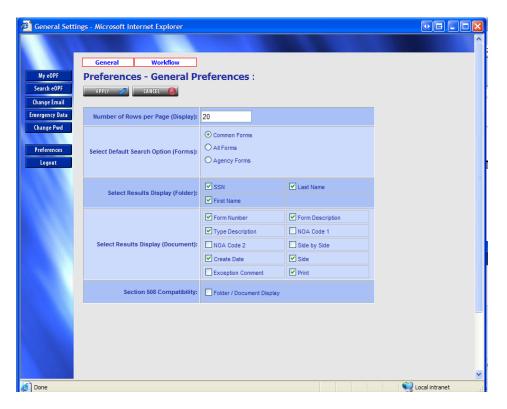


# To Change Your Preferences (Workflow):

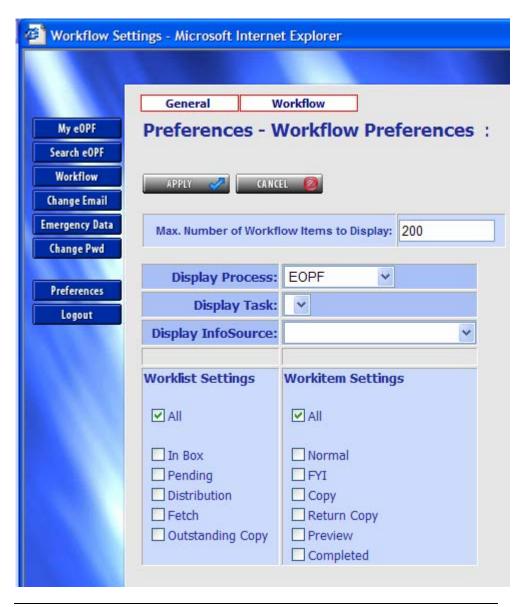
1. Click the Preferences Preferences button on the eOPF main menu.

The *Preferences* page appears with the General tab active.

The following figure displays the *General Preferences* page.

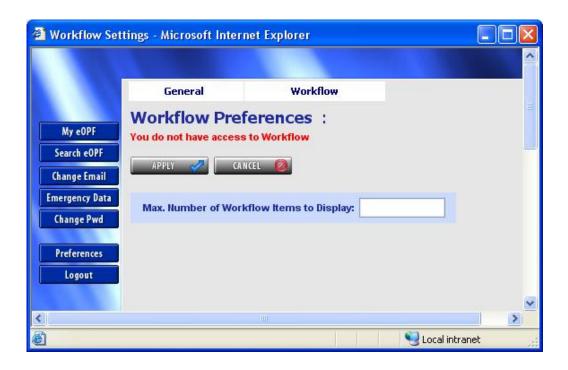


2. Click on the Workflow tab.



#### Note:

If you do not have workflow access the following page is displayed.

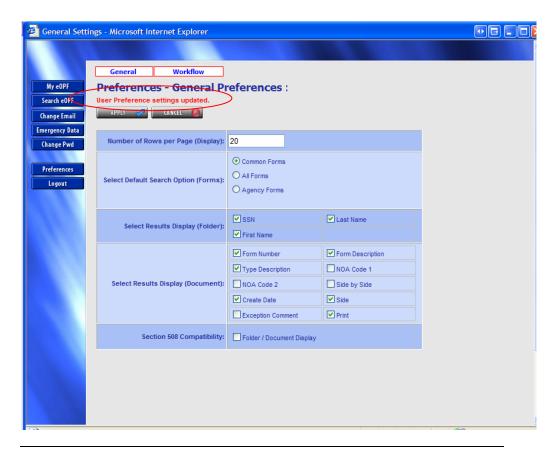


- Type your desired max number of workflow items per page to Display in the Max. Number of Workflow Items to Display field.
- 4. Select from the drop down lists to configure your preferences for work item list display.

See the chapter on workflow for detailed explanations regarding Display Process, Display Task, Display InfoSource and other Worklist and Workitem settings.

5. Click the Apply button. The *Preference* page displays a message "User Preference settings updated."

The following figure displays the *General Preferences* page with a confirmation message.



#### Note:

To cancel and return to the *eOPF Welcome* page, click the *Cancel* button.

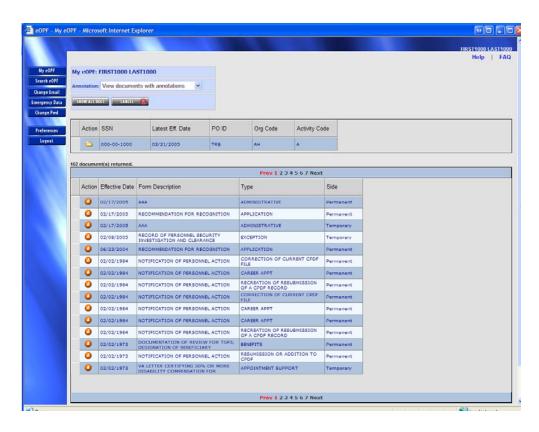
## **Viewing a Position Description (Optional Availability)**

eOPF offers the capability to view position descriptions through an online position description query (PDQ). This must be implemented to be used. By default, the position description function is disabled.

## To View a Position Description:

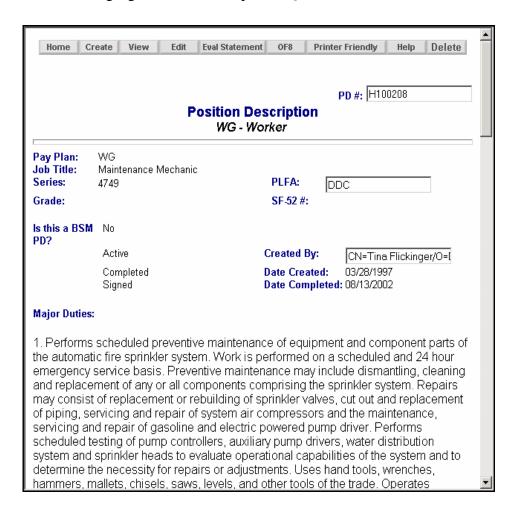
Click the My eOPF button on the eOPF main menu. The My eOPF Results page displays your eOPF folder and also lists the document within it.

The following figure displays the My eOPF Results page.



2. 2. Click on the Folder Action icon and select the View PDQ View PDQ option to view the PDQ.

The following figure shows a sample PDQ document.



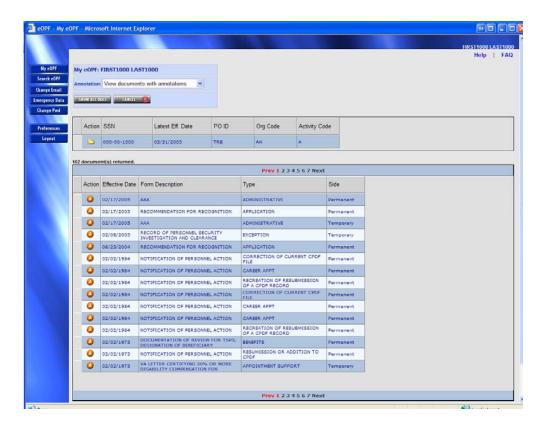
3. Close the PDQ window by clicking the Z Close button in the top right corner.

### Viewing a Career Brief

The eOPF optionally provides access to your career brief. The career brief is a summary of your career activities. It is both a viewable and a printable report.

This feature may or may not be enabled by your eOPF administrator.

This figure displays the *My eOPF Results* page.



### To View Your Career Brief:

- 1. Click the *My eOPF* button on the eOPF main menu. The *My eOPF Results* page displays a single row representing your eOPF folder and also lists the document within it..
- 2. Click on the <sup>□</sup> Folder Action icon and select the <sup>□</sup> View Career Brief View Career Brief option to view the Career Brief.

### **Accessing Online Help**

You can access eOPF online help by clicking on the *Help* link at the top of an *eOPF Web* page. From the *Help* page, you can jump to topics of interest.

The following figure shows the *eOPF Welcome* page with the *Help* link circled.



## **Accessing Frequently Asked Questions (FAQ)**

The eOPF provides access to a *Frequently Asked Questions* (FAQ) page. The FAQ page can be accessed by clicking on the FAQ link provided at the top of eOPF pages.

The following figure displays the *eOPF Welcome* page with the *FAQ* link circled.



Accessing the FAQ page provides current eOPF information to you. For example, the FAQ page may post information about:

- Definition of the eOPF
- Frequently asked questions
- What's new
- Discuss technical issues
- How to contact support; and
- Post general information about eOPF access.

# Chapter 8: Logging out of eOPF

In order to ensure the security of the eOPF, remember to log out of the system when you are finished.

#### Note:

You will be automatically logged out of the eOPF after the system is idle for a certain amount of time configured by your local Web site administrator.

The following figure displays the *eOPF Welcome* page with the *Logout* button circled.



### To Log out of eOPF:

1. Click the Logout button.
A log out confirmation prompt is displayed.

The following figure displays the log out confirmation page.



2. Click the OK button to logout and close the browser window.

-OR-

Click the Cancel button to return to eOPF and continue work.

# Glossary

**Administrator** A user that has special access to setup, modify,

and delete parameters within the eOPF system.

Career Brief A report (accessible via View Career Brief icon) that

is a summary of an employee's career.

Contact Information Data (accessible via Emergency Data icon) is

voluntarily supplied by employees for use by

management during an emergency.

**Groups** A combination of functional processes for

which a user is granted access.

**Folder** A container for documents.

**Password** A complex sequence of characters required for

access to the eOPF.

**Password Letter** Notification from the Agency to the employee

providing the password for the eOPF.

**Position Description** A written description of the duties, knowledge,

skills and abilities for a position in the Federal

Service accessible via icon. View PDQ

PDQ An View PDQ icon for accessing Position

Descriptions. May not be available on all

eOPF deployments.

Security Access A level of accessibility to documents and

functions within EOPF.

**Supervisor** A user that has access to not only his or her

own EOPF, but also is provided with access to view and print documents for employees that

he or she supervises.

**View Doc** A **a** view icon used to view the documents

within a folder.

# **Acronyms**

**eOPF** Electronic Official Personnel Folder

**NOAC** Nature of Action Code

**OPF** Official Personnel Folder

**OPM** Office of Personnel Management

**PDF** Portable Document Format

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